

# Needs to Solutions Library

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This file is to be used with the book [Efficiency Best Practices for Microsoft 365](#).

Search for your need in the first column. Then find the app(s) and solution details. If you want me to add any use cases, do send a mail to [askdoc@maxoffice.co](mailto:askdoc@maxoffice.co)

	Need	App	Solution
1.	Consistent and automatic Text formatting for topics and subtopics	Word	Use Built-in Styles. Create custom styles.
2.	Reorder topics in a document	Word	Use Styles. View – Navigation Pane. Drag topics. Promote or demote to change the level
3.	Reorder Paragraphs	Word PowerPoint	Click inside the paragraph. Press Shift Alt Uparrow or Downarrow.  For multiple paragraphs, select first and then use the same keyboard shortcut.  In Word, the same shortcut can be used to rearrange rows in a table.
4.	Create a Table of Contents	Word	Use Styles. Reference – Table of Contents.  Add captions to create a Table of Figures / tables.
5.	Text search / replace and manipulation	Word	Explore Advanced Find / Replace using Special characters, wildcards, and word forms.
6.	Complex Tables	Word	Create a regular table. Use Draw and Erase to create complex tables quickly.
7.	Input data	Excel	Familiar and common but not efficient.
8.	Input tabular data from multiple people securely	List	Create columns. Multiple data types. Mandatory columns. Validations. Share with multiple persons. Each person can see or edit only their own data. Live connection with Excel / Power BI to create Pivot tables and visuals.
9.	Input data from multiple persons as a form or survey	Forms	Create Form. Add questions. Share link internally or externally.
10.	Create an online evaluation or MCQ quiz	Forms	Create a Quiz. Add Multiple Choice Questions. Mark the correct answer. Decide points for each question. Add hint text. Make all

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			questions mandatory. Share Link. Evaluation is live and automatic.
11.	Create a Data entry app	Power Apps	Connect to data (Excel, SharePoint, List, or Dataverse). Create default app. Customize. Publish and Share.
12.	Visualize data	Excel	Always try Recommended Charts first. Notice the new types like Pareto, Waterfall, and TreeMap.
13.		Power BI	Choose the right visualization. Focus on interactivity. Do not try to recreate Excel charts.
14.	3D map	Excel	Built-in or add-in. Interactive. Works with globe or custom images. Add Date type of column into the Time field and explore Play button. Look at how your data evolved using a time-lapse animation. Export to Video and embed / share anywhere.
15.	Calculations	Excel	Comprehensive. 600 + functions. Find useful functions. Look at new functions and retrofit them.  Always use Tables for raw data to get automatic formula update.
16.	Calculated columns while importing	Power Query	Create calculated columns while importing the data using Power Query. This approach works in Excel as well as Power BI when the data does not change inside these apps.
17.	Calculated dynamic formulas	DAX	Once data is inside the data model – in Excel or Power BI, use DAX to create powerful measures easily. These are impossible to create using traditional Excel formulas. Learn DAX.
18.	Calculations inside tables	Word	Word can perform limited calculations inside cells of a table. Click in a cell – Table – Layout – Formula. Explore the options. Excel-like syntax also works. Just assume the top left cell is A1.
19.	Calculated columns during data entry	Lists	Create columns using formulas based upon data in other columns. Look at the function reference for details.

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20.	Calculated columns in Outlook	Outlook	Yes. Outlook also supports hundreds of functions. Right-click on a column heading – Field Chooser – New – Choose type Formula. Explore the functions. For example, You can easily calculate the Task variance using <b>Task Completion Date minus Due Date</b> .
21.	Data Clean up	Power Query	“Get and Transform” in Excel or “Get Data – Transform” in Power BI. All types of data clean-up are possible. Also, explore cloud-based Power Query in Power BI Dataflows.
22.	Combine data		From multiple csv / text files, multiple Excel files, or multiple sheets in Excel.
23.	Import data from a web page without copy-pasting		Do not copy-paste data from web pages. Use Power Query. Select Table. Clean-up. Import. Refresh as needed.
24.	Anything to picture	PowerPoint	Copy anything. New slide in PowerPoint. Right-click – paste as picture. If required, right click on the picture – Save Picture As (JPG, PNG, SVG).
25.	Record screen activity to create training material		Create a new presentation. Click on <b>Insert – Screen Recording</b> . Include Audio if necessary. Record the screen demo.  Add video to the slide. Right-click the video – Save Media As – MP4.
26.	Create Illustrations or diagrams by typing text	PowerPoint	Type the text. Right-click – <b>Convert To SmartArt – More SmartArt</b> – Choose Category – Choose Visual – Customize SmartArt.  Even if SmartArt is for use in Word or Excel, create it in PowerPoint and then copy-paste. Only PowerPoint can convert text to SmartArt.
27.	Create Flowcharts or Process Diagrams	Visio	<b>Do Not</b> use Word, Excel, or PowerPoint. Use Visio.  Choose the right shape collection (stencil). Drag-drop shapes, connect them, label them. Save as a picture or copy-paste directly.
28.	Data entry from picture	Excel Mobile	Excel Mobile – <b>Data from Picture</b> – Take photo – Crop image – <b>Preview and repair</b> – get it in Excel. Save to OneDrive. After sync, edit using Excel or browser.

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29.	Search or copy text from scanned documents or images	OneNote	<p>Open scanned document – <b>File</b> – <b>Print</b> – Choose OneNote Desktop. In OneNote, right-click on the printout – Copy text from all pages (or copy text from image).</p> <p>In OneNote, press <b>Ctrl + F</b> to search within the scanned document or image.</p>
30.	Store any useful data without using files	OneNote	Copy Paste to OneNote. Pasting from the web page adds the URL automatically. Create notebooks and sections logically. No need to remember file names and folders. Store all notebooks on OneDrive. Use across devices.
31.	Store all new files	OneDrive	Create folder structure. Store files on OneDrive. You can edit it offline. Share links instead of sending attachments.
32.	Save a file created for a project	Teams	Create the file directly inside the relevant Teams Channel – <b>Files</b> tab. If you have already created the file, choose <b>File</b> – <b>Save as</b> – <b>Sites</b> . <b>Sites</b> means Teams. Choose the Team and Channel. Save directly to Teams.
33.	Store Video files	Stream	<p>DO NOT store videos on file shares, SharePoint, OneDrive, or Teams.</p> <p>Always store videos using Stream. Remember to set the video language. If it is one of the supported languages, Stream will create a searchable transcript automatically.</p>
34.	Get multiple files from different people without using email	OneDrive	<p>Create a new folder in OneDrive on the browser. Ellipsis menu – <b>Request Files – Create link</b>. Send it to people. They can upload file(s). They cannot see other's files. They cannot view or edit their own files after upload.</p> <p>When you finish collecting files, Delete the link.</p>
35.	Email directly to a channel (Replacement to Group Mailboxes)	Teams	<p>Open the Ellipsis menu next to a Teams Channel – Get email id. Mails and attachments sent to this ID automatically land in the channel.</p> <p>Discuss and manage the incoming communication inside the channel.</p>

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36.	Send mails automatically when someone Submits a Form	Forms, Power Automate	Trigger is form submission. Action depends upon your needs. Look at the form data and decide the conditions and actions.
37.	Create web page	Sway	Start from Word or PowerPoint. OR add your text, images, videos, audio, and more. Choose the design and style. Test and Share Link.
38.	Send the same mail to multiple persons using data	Word, Excel or Outlook, or any database	Use Word MailMerge. Design the document. Connect to the data source. Add merge fields. Preview. Test. Run.  Limitations: CCs not possible. Attachments are not possible.
39.	MailMerge with attachments and CCs	Excel and Power Automate	Keep the data in Excel (or any other data source). Use Power Automate Instant Flow (Button flow) to scan the Excel data and compose and send Emails as needed. Ensure that you are not exceeding the spam limits of <a href="#">Exchange online</a> . This limit is intentionally undocumented but thought to be between 1000 to 10000 mails a day. DO NOT use Microsoft 365 for mass mailing. Your mailbox can be blocked.
40.	Create PDF	All Office apps	File – Export to PDF. Customize Options before exporting.
41.	Edit PDF files	Word	Right click the PDF file in <b>File Explorer</b> – <b>Open With</b> – <b>More Apps</b> – <b>Word</b> . Needs Word 2016 or later.  Click <b>Yes</b> for the warning. Wait for Word to process the file. Edit or format the file. Save as PDF or Word.
42.	Brainstorm visually with people	Whiteboard	Ideally, use the Windows 10 app. Create a whiteboard. Use a relevant template. Add people. Edit together on Windows, Teams, Browser, or Mobile.
43.	Focus on reading text	Immersive Reader	Available in Word, Outlook, OneNote, Teams, and Edge – supports 40+ languages. Helps you focus on and understand the long text. Read aloud. Translate. Hear pronunciations.